

# ***Customer First Summary Assessment Report***

Organisation: The TCM Group

Assessor: Kerry Hunn

Dates of Assessment: 6<sup>th</sup> June 2019

## Contents

---

Overall Performance Summary.....	3
Assessment Outcome .....	9
Breakdown of Assessment Performance .....	9
<i>Areas for Development Essential to Meet the Standard</i> .....	10
Outcome Sheets.....	11
Section 1 - Customer Relationships.....	11
Section 2 - Market Awareness .....	12
Section 3 - People.....	13

## **Overall Performance Summary**

---

### **Introduction**

Founded in 2001 by CEO David Liddle, the TCM Group (TCM) provides mediation and innovative solutions to the management of conflict in the workplace. Over the past 18 years, the organisation has supported thousands of organisations including major blue-chip companies, large government departments and public sector organisations.

Although a leader in its sector, TCM does not rest on its laurels and maintains a focus on innovation and continuous improvement in order to drive the business forward. The climate in which the organisation operates continues to be volatile however, the in-depth knowledge and understanding of its markets, coupled with the expertise of its people, means that TCM is well placed to capitalise on the stage of maturation that it has now reached, focusing on 'stability, consistency and growth.'

Whilst ambitious and innovative, with a 'confident and high growth mentality', TCM retains a healthy realism and acknowledges that there are still areas where improvements need to be made, as identified in the 2019-2021 Corporate Strategy.

The people are clearly regarded as the organisation's most valuable asset and the management team works hard to ensure TCM is an "*exciting, vibrant and great place to work.*"

Equally valued are the network of highly experienced associates who carry out work on behalf of TCM and the organisation takes great pride in having some of the best professionals in the sector. As David Liddle comments on the company website, "*they have an unrivalled depth of knowledge and industry expertise.*"

The huge amount of evidence relating to the Customer First standard means that it is not possible to refer to everything individually. However, the Assessor hopes that this report effectively captures TCM's key strengths and reflects the positive culture, energetic environment and admirable values which underpin everything the organisation does.

It was an absolute pleasure to visit TCM and see first-hand the excellent work that goes on there in support of the Customer First standard.

### **Customer Relationships**

- Articulated in the organisational values, the priority TCM places on its customers and to delivering the best possible experience for them, is abundantly clear:

*"COURAGE: we won't stop until your needs and expectations are exceeded".*

- This commitment is translated into specific targets, as outlined in the 2019-2021 Corporate Strategy, relating to planned improvements to the Customer Journey, notably "delighting the customer".

- Great care is taken to identify customer needs at the first point of contact with the organisation and to establishing a good relationship at the outset.

*“We try to build the relationship early on.”*

The ‘Discovery’ stage of the Customer Journey includes a thorough diagnostic where customer needs and problems are identified.

- In addition, customers know what to expect from TCM through clearly articulated joining instructions, programme objectives and contracts, and regular telephone reviews.
- In order to ensure customer expectations are met, and in pursuit of the goal of ‘delighting the customer’, quantifiable, time-bound targets are in place for service delivery such as *“100% of proposals with a value of less than £5k issued by sales team within 5 working days of meeting or call.”*
- A lot of time and energy is invested in building long-term relationships with customers, with a focus on retaining loyalty and turning customers into ‘partners’.

*“It’s about nurturing the relationships.”*

Ways in which TCM builds and maintains these relationships include:

- A dedicated team responsible for existing clients
- Follow-up phone calls after each interaction
- Monthly newsletters
- Free events and webinars
- A defined aftercare process
- Regular reviews
- Helpline support

As a result of these efforts, TCM has a large percentage of repeat clients.

- Detailed feedback from customers is collected via end of course evaluations, follow-up emails etc. All the evaluations come to a central point and are reviewed by the CEO. Specifically, feedback has been gathered from the following clients recently:
  - Blind veterans UK
  - Surrey Heartlands
  - BRC
  - Refinitiv
  - UCAS
- Perhaps more importantly though, feedback is acted on to implement tangible changes and improvements where required:

*“We try to act on anything suggested.”*

- The organisation is not afraid of negative feedback and there is an accessible Complaints Policy. Complaints are taken seriously and are addressed in a timely manner.
- Having said all of the above, the organisation does recognise that there is room for improvement in relation to the customer experience. The current Corporate Strategy outlines the ‘Customer Journey’ and acknowledges that parts are ‘aspirational’ but that each stage will be ‘developed to the highest possible standard’ over the next 3 years.

## **Market Awareness**

TCM understands its customers and markets well, and works hard to retain its position as *“the UK’s foremost provider of workplace mediation, conflict resolution.”*

- The Corporate Strategy outlines plans to help the organisation maintain its position and achieve its 2019-2021 goals of ‘stability, consistency and growth.’
- These are shared with everyone and are discussed regularly at team meetings. The overarching plans are translated into the team and individual objectives so that everyone contributes directly to the organisational success.
- Innovation is seen as being absolutely vital to ensuring the organisation remains at the forefront of its field:

*“We have.....a suite of services and products which are world-class, innovative and based on the needs of our clients.”*

Indeed the whole systems model is, in itself, a highly innovative approach to workplace dispute resolution.

- New technology is adopted and used to good effect, proving beneficial in a number of areas, including managing customer records and marketing:
  - Salesforce is used to record customer information, allowing for the effective targeting of different client groups
  - An automated marketing system facilitates tasks such as emails and social media
  - The newly relaunched website contains a wealth of information for customers, presented in a user-friendly, easily navigable format.

- As mentioned in the previous section, customer needs are reviewed regularly, identifying new products and services which may be of value to them, thereby securing mutual benefits for both parties.
- The continuous gathering of feedback and evaluation of service delivery facilitates the organisation's drive for continuous improvement.
- Many staff within TCM are experts in their field. They take the initiative in keeping themselves up to date with developments in the sector and new information and knowledge gained is then shared at team meetings.
- Excellent working partnerships have been established with a network of associates who conduct a significant proportion of work on behalf of TCM. In addition, the organisation recognises the benefits of working with other companies as outlined in Priority 6 of the Corporate Strategy: *"Develop partnerships and joint ventures with organisations who can refer work to us and who benefit from working with TCM."*
- The organisation has achieved accreditation against several quality marks and recognition by numerous external professional bodies. These are used effectively to review and improve practices, and are also extremely valuable for demonstrating a high level of quality and boosting credibility with customers. Examples include:
  - Mediation Provider of the Year 2018 at the National Mediation Awards
  - Accreditation as a Centre of Excellence by the Professional Mediators' Association
  - Registration with the Civil Mediation Council
  - Certified member of CPD service providers
  - Consultancy of the Year finalist at the 2015 Personnel Today awards
- As is recognised in the Corporate Strategy, TCM is operating in a relatively new, and often volatile, sector. As such, certain challenges still need to be addressed such as effective upselling to clients through better alignment of products and using data more effectively to exploit market share.

## People

- TCM clearly values its people greatly and acknowledges their crucial role in securing organisational success: *“Together, they make TCM one of the fastest growing and most successful mediation, conflict resolution, employee relations and leadership development consultancies in Europe,”* (company website).
- There is an induction process for staff and associates which ensures that people understand how the company operates and what is expected of them from the outset.
- The Core Values of Innovation, Courage, Excellence, Collaboration and Integrity are at the heart of everything the organisation does and very much set the tone for how it expects its people to behave. The Assessor found a shared understanding of these and a genuine desire amongst staff to adhere to them.
- Communication strategies facilitate an open and transparent dialogue with staff and, on the whole, are effective at keeping people up to date with developments within the organisation and ensuring that they feel engaged and valued.
- The Assessor found that there was a positive energy at the head office and that people are enthusiastic about their work.
- The main vehicles for discussing individual performance and development are the annual appraisal and 1:1 reviews. Again, the assessor found that people, largely, find these a valuable opportunity to discuss their own personal progress and understand how their individual objectives fit with the wider organisational goals.
- Recruitment and selection processes appear to be aligned to the organisational values, and are effective in *“attracting top talent into the business.”* Having said this, recruitment is an area identified as a weakness in the current Corporate Strategy SWOT analysis; therefore a review may be necessary.
- There is a strong commitment to the ongoing development of staff, not just in order to ensure the organisation remains competitive, but also to fulfil individual aspirations and keep motivation levels high. The Assessor found numerous examples of training such as in-house training using the ‘fair’ model, train the trainer and salesforce.
- People are expected to take a degree of ownership for their own Continuing Professional Development and the importance of self-reflection is also recognised as a development tool; associates must complete a reflective log after each assignment delivered.
- Development activities are evaluated informally. However, the Assessor feels that this is an area where there could be an opportunity for further development.

## **In summary**

The assessor was presented with a wealth of positive evidence showing how the TCM Group continues to meet the Customer First standard.

Since the last assessment, the TCM Group has retained its focus on continuous improvement, scrutinising operations and making changes to ensure it keeps pace with the market, whilst maintaining absolute quality in existing activities.

In order to do this effectively, the organisation has a team of people who understand the organisation's objectives and clearly enjoy what they do. They are provided with an open and supportive environment where they can develop and grow as individuals.

Congratulations to everyone within TCM; the assessor would like to wish you all continued success in the future.

## ***Assessment Outcome***

---

TCM was assessed against the 30 Statements and was found to be compliant.

## ***Assessor Quote***

---

“A very professional organisation that embraces continuous improvement and puts values at the heart of its business”.

## ***Breakdown of Assessment Performance***

---

	<b><i>Compliance</i></b>	<b><i>Partial Compliance</i></b>	<b><i>Non Compliance</i></b>
<b><i>Customer Relationships Overall Score</i></b>	12		
<b><i>Market Awareness Overall Score</i></b>	11		
<b><i>People Overall Score</i></b>	7		
<b><i>Overall Score</i></b>	<b>30</b>		

## ***Areas for Development Essential to Meet the Standard***

---

There are no areas for development essential, to meet standards.

## Outcome Sheets

---

### Section 1 - Customer Relationships

---

		<b>Compliance</b>	<b>Partial Compliance</b>	<b>Non Compliance</b>
<b>1.</b>	We build successful long-term relationships with our customers	x		
<b>2.</b>	We identify our customer needs at the first point of contact with us	x		
<b>3.</b>	Where appropriate, our customers can access other relevant and related services through their contact with us	x		
<b>4.</b>	We clearly specify what our customers can expect from the service we provide to them	x		
<b>5.</b>	We deliver services to our customers in a timely manner or within agreed timeframes	x		
<b>6.</b>	The needs of our customers are reviewed appropriately during service delivery	x		
<b>7.</b>	Our people follow clear guidelines to select the most appropriate organisation to either contract with or refer to, in the best interests of the customer	x		
<b>8.</b>	Our people have access to relevant customer information that is accurate and up to date	x		
<b>9.</b>	We gather customer feedback to check the effectiveness of our service delivery and identify opportunities for improvement	x		
<b>10.</b>	Where appropriate, we follow up our customers after we refer them to others	x		
<b>11.</b>	We always follow up and swiftly resolve customer complaints or concerns	x		
<b>12.</b>	We evaluate, review and understand the impact our services have on our customers	x		
	<b>Overall Score</b>	<b>12</b>		

## Section 2 - Market Awareness

		<b>Compliance</b>	<b>Partial Compliance</b>	<b>Non Compliance</b>
<b>13.</b>	All our people and those working on our behalf understand the purpose, aims and values of our organisation	X		
<b>14.</b>	We have overall business objectives that we measure and regularly review	X		
<b>15.</b>	We regularly review and identify the different needs of our customer groups	X		
<b>16.</b>	We keep our people up-to-date with the changes in our industry sector and other related service provision	X		
<b>17.</b>	We build successful long term relationships with other organisations for the benefit of our customers	X		
<b>18.</b>	Potential customers are carefully selected and targeted in any marketing activity	X		
<b>19.</b>	The introduction of every new or changed service is based on a clear rationale	X		
<b>20.</b>	We develop and improve our services by working in partnership with other organisations	X		
<b>21.</b>	We share knowledge with our customers and where appropriate, with other organisations	X		
<b>22.</b>	We set overall objectives for service delivery which we regularly review to ascertain how our performance affects our customers	X		
<b>23.</b>	We support continuous improvement – we are able to demonstrate that we learn from our experience and make improvements to our services as a result	X		
	<b>Overall Score</b>	<b>11</b>		

## Section 3 - People

---

		<b>Compliance</b>	<b>Partial Compliance</b>	<b>Non Compliance</b>
<b>24.</b>	We ensure we recruit the right people with a customer focused attitude by using effective and appropriate recruitment methods in line with equality of opportunity principles	x		
<b>25.</b>	Our people understand their role within our organisation and are clear about what we expect from them	x		
<b>26.</b>	Our people have the necessary skills to effectively understand and meet customer needs	x		
<b>27.</b>	We use customer feedback to evaluate our peoples' performance	x		
<b>28.</b>	We regularly review and appraise our people to ensure that they are developed to perform their job effectively	x		
<b>29.</b>	Our people have training and development which is evaluated to ensure it has a positive impact on customer delivery	x		
<b>30.</b>	We act in the best interests of our customers at all times	x		
	<b>Overall Score</b>	<b>7</b>		